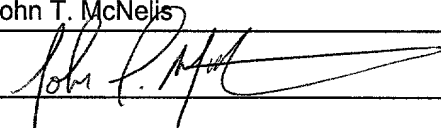# NEW UTILITY PATENT APPLICATION TRANSMITTAL

(only for new nonprovisional applications under 37 CFR 1.53(b))

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APPLICATION ELEMENTS	ACCOMPANYING APPLICATION PARTS

1. ☑ Fee Transmittal Form (in duplicate)
   - ☐ Check Enclosed
2. ☑ Specification
   (preferred arrangement set forth below)
   - ■ Descriptive Title of the Invention
   - ■ Cross Reference(s) to Related Case(s)
   - ■ Statement Regarding Fed sponsored R & D
   - ■ Background of the Invention
   - ■ Brief Summary of the Invention
   - ■ Brief Description of the Drawing(s)
   - ■ Detailed Description
   - ■ Claim or Claims
   - ■ Abstract of the Disclosure
3. ☑ Drawing(s) *(when necessary per 35 USC 113)*
4. Oath or Declaration
   a. ☐ New Declaration
      - ☐ Executed
   b. ☐ Copy from a prior application (37 CFR 1.63(d))
      (for continuation/divisional with Box 17 completed)
      i. ☐ DELETION OF INVENTOR(S)
         Signed statement attached deleting inventor(s) named in the prior application, see 37 CFR 1.63(d)(2) and 1.33(b).
5. ☐ Incorporation by Reference *(useable if Box 4b is checked)*. The entire disclosure of the prior application, from which a copy of the oath or declaration is supplied under Box 4b, is considered as being part of the disclosure of the accompanying application and is hereby incorporated by reference therein.

6. ☐ Assignment & Assignment Recordation Cover Sheet
7. ☐ Certified Copy of Priority Document(s)
   (if foreign priority is claimed)
8. ☐ Information Disclosure Statement & PTO-1449
   - ☐ Copies of IDS Citation(s)
9. ☐ Preliminary Amendment
10. Small Entity Statement
    - ☐ New Statement enclosed
    - ☐ Statement filed in prior application. Status still proper and desired
11. ☑ Return Postcard
12. ☐ _____
13. ☐ _____
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15. ☐ _____
16. ☐ _____

ADDRESS TO:

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17. If a CONTINUING APPLICATION, *check appropriate box and supply the requisite information below and in a preliminary amendment:*

☐ Continuation ☐ Divisional ☐ Continuation-in-part (CIP) of prior application No: ___/_____

Prior application information: Examiner: _____ Group/Art Unit: _____

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AUTOMATIC LEAD DISTRIBUTION AND PROCESSING CONFIRMATION SYSTEM AND METHOD

5   Inventor: Axel Schultze

BACKGROUND OF THE INVENTION

10   1. Field of the Invention

This invention relates to the field of lead distribution and processing and more particularly to automatic lead distribution and processing confirmation systems and methods in a computer based environment.

2. Description of Background Art

Many businesses spend significant resources advertising
20 their wares and services in order to attract clients. Oftentimes the success rate of many promotion activities such as direct mailings or cold-calls is low and inefficient. These direct mass mailings are frequently sent to users who have no interest or need for the advertised product or service. For example, an
25 advertisement for the latest computer software program will typically not be effective if sent to a person who does not own or use a computer.

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To increase the effectiveness of a sales force and of
advertising resources, many companies focus their resources on
potential customers who are more likely to be interested in the

5   products or services. With reference to a sales force these
potential customers are often called ``leads.'' The current
method of developing and using leads has many problems. One such
problem is that it is often difficult to identify promising
leads. Another is that even when a promising lead is identified

10   the lead is frequently ``cold.'' An example of a cold lead is
one that at one time was interested in a product or service but
has since become less interested.

A related problem is that companies (lead aggregators) often

15   have a large number of leads based upon a variety of sources,
e.g., Internet or mail registrations, marketing responses, etc.
Oftentimes, these companies cannot follow up with all of these
leads and as a result many of the leads are not contacted or
become cold by the time they are contacted. Not only does this

20   result in a lost opportunity but the lead may be expecting to be
contacted so a significant delay in contacting the lead may make
the lead less likely to purchase or use a product or service and
can result in a loss of good will.

25   When a lead is expecting to be contacted, a company may
assign the lead to a particular reseller or salesman who may not
contact the lead in a timely manner, or may not contact the lead

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at all. Many companies do not have efficient systems and methods
in place to track leads. Therefore the risk of reducing the
company's good will because a lead is not properly or quickly
contacted is a significant concern.

5

Another problem with conventional systems and methods is
that a lead is often given to multiple resellers since no
efficient techniques exist for matching the lead with a reseller
and since no efficient follow-up system is in place. It is not
10 uncommon for a lead to be contacted by many resellers which may
bother the lead.

In addition, the large list of leads generated by such
companies is of significant value to many resellers of products
15 or services. However, these companies have no way of efficiently
finding a reseller or salesman who is interested in receiving the
lead. Another problem is that the company generating the leads
may want to receive some compensation or benefit for each lead
that results in a successful sale. Currently the company
20 generating leads must rely on the reseller or salesman to
accurately disclose the results of the leads. Another problem is
that the lead aggregators may want to perform some pre-screening
and pre-qualification of the reseller and/or the leads to make
sure that the leads are matched with appropriate resellers. For
25 example, a quality lead, e.g., a lead that may be the source of
significant sales, should be matched with a high quality

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reseller. Currently, such matching is difficult and time

consuming and, therefore, is rarely done.

Another problem with conventional systems is that resellers

5   typically must contact the lead without any introduction. This

cold-call makes the reseller's task more difficult. Currently,

there is no efficient way of introducing leads to resellers.

Such conventional systems and methods for identifying and

10   processing leads are inefficient and inaccurate. They do not

enable leads to be efficiently identified, they permit a large

number of leads to become cold, they permit a large number of

leads to not be contacted, have no system or method in place to

verify when a lead is contacted, and they do not have an

15   efficient system or method for accurately reporting results of

the contacts.

Accordingly, what is needed is a system and method that (1)

enables leads to be efficiently identified by an interested

20   partner, salesman, or reseller; (2) reduces the number of leads

that become cold; (3) motivates a reseller to promptly contact

the lead; (4) automatically provides feedback to the lead and/or

to the source of a lead when a reseller selects a lead and when

the reseller processes the lead; (5) provides a system and method

25   for automatically evaluating the result of a contact; (6)

automatically increases the accuracy of the reporting of results;

and (7) automatically introduces the reseller to a lead.

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SUMMARY OF THE INVENTION

5   The invention is a system and method for efficiently,
accurately, and inexpensively receiving, assigning, and tracking
leads. In one embodiment, the invention enables leads to be
efficiently identified by an interested salesman or reseller by
providing a database of leads that can be searched according to a
10   variety of parameters. In one embodiment, the invention also
reduces the number of leads that become cold by quickly and
efficiently matching sources of leads with a variety of salesmen/
resellers/users who are interested in utilizing a lead. In one
embodiment, the present invention motivates a reseller to
15   promptly contact a lead that the reseller selects by limiting the
amount of time that a lead is available exclusively to the
reseller. The reseller must contact the lead before the lead
becomes available again to other resellers. In one embodiment,
the invention also automatically provides feedback to the lead
20   and/or to the source of a lead when a reseller selects a lead and
when the reseller processes the lead in order to increase the
accountability of the reseller. In an embodiment, the invention
also provides a system and method for automatically evaluating
the result of a contact which enables the lead source to better
25   track the results of providing leads. In an embodiment, the
present invention also automatically increases the accuracy of
the reporting of results by automatically sending the results of

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the contact, as reported by the reseller, to the lead, the system administrator, and to the lead source. In addition, the present invention automatically introduces the reseller to a lead before the lead is contacted by the reseller.

5

BRIEF DESCRIPTION OF THE DRAWINGS

Figure 1 is an illustration of a computer environment in which the present invention can operate.

10

Figure 2 is a flowchart illustrating a method of selecting and processing a lead according to the preferred embodiment of the present invention.

15   Figures 3a and 3b are flowcharts illustrating a method of selecting a lead according to the preferred embodiment of the present invention.

Figure 4 is a flowchart illustrating a method of processing

20   leads according to the preferred embodiment of the present invention.

Figure 5 is an illustration of a computer screen display available to a user according to one embodiment of the present

25   invention.

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Figure 6 is an illustration of a computer screen display showing a lead search result according to one embodiment of the present invention.

5   Figure 7 is an illustration of a computer screen display showing a summary of selected leads according to one embodiment of the present invention.

Figure 8 is an illustration of a computer screen display
10   showing additional detail of a selected lead according to one embodiment of the present invention.

Figure 9 is an illustration of a computer screen display showing how a user provides feedback about lead results according
15   to one embodiment of the present invention.

DETAILED DESCRIPTION OF THE PREFERRED EMBODIMENTS

20

A preferred embodiment of the present invention is now described with reference to the figures where like reference numbers indicate identical or functionally similar elements. Also in the figures, the left most digit of each reference number
25   corresponds to the figure in which the reference number is first used.

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The invention is directed toward a system and method for efficiently, accurately, and inexpensively receiving, assigning, and tracking leads. In one embodiment, the invention enables leads to be efficiently identified by an interested salesman or reseller by providing a database of leads that can be searched according to a variety of parameters. In one embodiment, the invention also reduces the number of leads that become cold by quickly and efficiently matching sources of leads with a variety of salesmen/ resellers/users who are interested in utilizing a lead. In one embodiment, the present invention motivates a reseller to promptly contact a lead that the reseller selects by limiting the amount of time that a lead is available only to the reseller. If the reseller does not contact the lead before the time limit expires, the lead becomes available again to other resellers. In one embodiment, the invention also automatically provides feedback to the lead and/or to the source of a lead when a reseller selects a lead and when the reseller processes the lead in order to increase the accountability of the reseller. In an embodiment, the invention also provides a system and method for automatically evaluating the result of a contact which enables the lead source to better track the results of providing leads. In an embodiment, the present invention also automatically increases the accuracy of the reporting of results by automatically sending the results of the contact, as reported by the reseller, to the lead, the system administrator, and to the lead source. Not all of the above features and elements are necessary for the operation of the invention, instead the

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features listed above include some of the features in the
numerous embodiments of the invention.

5   Figure 1 is an illustration of a computer environment in
which the present invention can operate. This embodiment
includes a client computer 140 and a server computer 102. As
described below, this is one example of the computer environment
and is not intended to limit the scope of this invention. The
server 102 includes a processor 106, an input/output (I/O) unit
10   108 and a conventional memory/storage unit 104. The processor
106 can be a conventional processor, e.g., a Pentium III
processor that is commercially available from Intel Corporation,
Santa Clara, California. The I/O unit 108 is conventional and
permits the server 102 to communicate with other computers,
15   networks, and peripheral devices, for example. The
memory/storage unit 104 is a conventional memory/storage unit.

The memory/storage unit 104 includes a lead unit 110, a
reseller unit 112, a lead control unit 114, a lead input unit
20   116, a lead status unit 120, a timing unit 122, an operating
system unit 124, an administrative unit 130, an administrative
control unit 126, a vendor unit 132 and a vendor control unit
134. The operation of these units is described below.

25   The server 102 is connected to a wide area network (WAN)
135. As described below, this is only one embodiment of the
invention. The WAN 135 is coupled to the client 140 which may be

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located at a site remote from the server (but need not be in alternate embodiments). The client includes a conventional processor 142 an I/O unit 144 and a memory storage module 150 that includes software such as the lead request unit 152 that is

5 described in greater detail below.

The memory/storage modules 104, 150 can be conventional memory devices, e.g., random access memory (RAM), read only memory (ROM), a floppy disk, a compact disc ROM (CD-ROM), a

10 compact disc recordable disk (CD-R/W), or a digital versatile disk (DVD), for example.

Figure 1 illustrates one embodiment in which the present invention can operate (a client-server environment). However,

15 many other computer system environments can be used. For example, it will be apparent to persons of ordinary skill in the art that the entire invention can be part of a single computer or can be part of a local area network. In addition, the individual units can be performed on separate computers instead of only a

20 single server, and some of the functions can be distributed to one or more computers, e.g., the client 140, described above. In addition, the invention can be part of any computer system, e.g., a personal digital assistants (PDA), such as a conventional Palm Pilot, that is commercially available from 3Com, in Santa Clara,

25 California, a mobile phone, or any type of computing device. The connections may be wireline or wireless. It will be apparent

that many different types of computer based environments may be used without departing from the scope of the present invention.

As described above, the present invention addresses a variety of problems of finding, distributing and processing leads. In one embodiment, a lead source sends a set of leads to a system administrator (via the administrative unit 130) who places the leads into the lead unit 110, e.g., a database. This process can also be performed automatically. The lead unit 110 can include leads from many lead sources. As described above, the lead source can identify the leads based upon a wide variety of techniques such as mail registration, Internet registration, electronic mail requests, etc. A reseller, who can also be referred to as a salesman or user, is a person who utilizes the system to locate leads. The operation of the invention is now described with respect to these participants.

Figure 2 is a flowchart illustrating a method of selecting and processing a lead according to the preferred embodiment of the present invention. The reseller selects 202 a lead. A more detailed description of this selection process is set forth with respect to figures 3a and 3b. Figures 3a and 3b are flowcharts illustrating a method of selecting 202 a lead according to the preferred embodiment of the present invention. When selecting 202 a lead, the reseller first requests 302 a list of potential leads. The reseller can use a variety of variables or parameters to reduce the number of leads that will appear in the list. For

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example, the reseller can request leads associated with a
particular product and/or in a specific geographical location.
It will be apparent that many different parameters can be
associated with leads and the examples described herein are
5   merely illustrative. In the preferred embodiment the number of
selected but not-processed leads can be limited in order to
prevent the hoarding of leads and to encourage resellers to
quickly contact and process a lead. In addition, there may be
other requirements that the reseller must meet in order to select
10   leads.

The present invention may also perform some pre-screening of
leads. The lead control unit 114 performs a matching operation
by contacting the reseller control unit 118 which searches the
15   attributes of the resellers and matches the reseller's interests
with attributes of the lead. For example, attributes of the lead
such as the product they are interested in are matched to the
reseller's interest and qualifications in order to match the
interests of the lead with the reseller.
20

The administrative unit 130 in conjunction with the reseller
unit 112 and the reseller control unit 118 determines 304 whether
the reseller is permitted to select leads. If not, the reseller
is informed 306 of the reasons for not being able to select
25   leads, e.g., too many outstanding selected and non-processed
leads, and the process continues. At this point the reseller may

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be permitted to process some of the selected leads using the techniques described below.

If the reseller is permitted to select a lead, the lead control unit 114 creates 308 a lead list from a set of active leads in the lead unit 110. This set may, optionally, be a subset of the total active set based upon the requirement that one or more parameters be satisfied, as describe above. The reseller may decide 310 that the set is too broad or is too narrow and can modify 312 the set to account for different parameters of the leads in which case the lead control unit 114 creates 308 another set of leads based upon the updated parameters. The reseller may select 314 one or more leads from any of these lead lists and may continue 315 to modify 312 the set and select 314 one or more leads until they reach their lead limit.

One feature of the present invention is that when a lead is selected the administrative unit 130 receives the selected lead from the lead control unit 114 and automatically sends 316 a confirmatory indicator, e.g., an e-mail, to the reseller which confirms the selection. In addition, the administrative unit 130 automatically sends 320 a notification to the lead informing the lead that they have been selected. This notification serves several functions. Specifically it provides an introduction of the reseller to the lead and informs the lead that they should expect to be contacted by the lead. This serves to increase the

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chance of a successful contact by eliminating the need for the reseller to cold-call the lead and it also provides an incentive to the reseller to contact the lead in a timely manner since the lead is expecting to be contacted. This notification may also

5   include ``cross-selling,'' e.g., providing information about other relevant products or services that may be of interest to the lead. Cross-selling information may be provided by the lead source, system administrator and/or reseller. In some embodiments the administrative unit 130 automatically sends 320

10   the lead the name of the reseller and provides to the lead a time period in which the lead should expect to be contacted by the reseller. In addition, the administrative unit automatically sends 320 a notification to the reseller control unit 118 identifying the lead and the time of selection. This feature of

15   the present invention provides motivation to the reseller to quickly contact a lead because the lead is aware that they have been selected. In addition, as described below, in one embodiment, the time period in which the reseller can maintain the lead exclusively is limited. That is, the time period in

20   which the lead is not in the active set of leads is limited. The reseller control unit 118 receives an indication of the selection and stores the selected lead information along with the selection time in the reseller unit 112.

25   The lead control unit 114 provides 322 additional information about each selected lead to the reseller. This additional information can include but is not limited to specific

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contact information such as a contact name(s), company name, website, phone number, fax number, address, e-mail address, origin of lead, origination date of lead, product interest(s), language, and lead company information. The lead control unit

5   114 then automatically 324 removes the selected lead(s) from the active set of leads and places them in a ``selected'' set of leads. Only those leads that are in the active set of leads can be selected by another reseller. As will be described in greater detail below, the administrative unit 130 in conjunction with the

10 timing unit 122 may limit the amount of time an unprocessed lead is removed from the active set of leads.

The order of operation described above and illustrated in Figures 3a and 3b is one example of the method of the present

15 invention. In alternate embodiments the order of steps may differ. For example, the lead control unit 114 can provide additional information to the reseller before the confirmation and notifications are sent 316, 318.

20 Referring again to Figure 2, after the reseller selects 202 a lead, the administrative unit 130 determines 204 whether a time limit for processing the lead is approaching. The administrative unit 130 can perform this periodically in order to identify when the time limit arrives, e.g., checking every day, hour, minute,

25 second or continuously, for example. If the time limit is approaching, e.g., if the time-limit is one day away, the administrative unit 130 sends 206 a reminder to the reseller

indicating that the lead should be processed before a deadline. In alternate embodiments, no warning is sent and the administrative unit 130 in conjunction with the timing unit 122 determines 208 whether the processing time limit has expired. If the processing time limit has expired the lead control unit 114 in response to the administrative unit 130 automatically places 212 the lead into the active set of leads by, for example, changing a flag value of the lead. The administrative unit 130 also automatically sends 214 a notification to the lead, e.g., via an e-mail message or facsimile. In addition, the vendor unit 132 may automatically notify the the lead source (lead aggregator). The administrative unit 130 may also contact the reseller automatically or may contact a system administrator to inquire as to why the lead was not contacted and processed. The administrative unit 130 also instructs 216 the reseller control unit 118 to store this expiration information in the reseller unit 112. This information can be used to provide feedback to the reseller and the lead source, for example. The feature of limiting the time period in which a selected lead is taken off the active set of leads reduces the number of leads that become cold and motivates a reseller to promptly contact the lead since after the time period expires the lead will become available to the rest of the resellers. If the processing time limit has not expired the reseller may process 210 the lead.

Figure 4 is a flowchart illustrating a method of processing leads according to the preferred embodiment of the present

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invention. After contacting a lead (or attempting to contact a
lead), the reseller can proceed to process the lead. The
reseller chooses 402 one of the previously selected leads to
process and identifies 404 the result for the selected lead. The

5   user may select one of a predefined set of results such as
``sale,'' ``no interest,'' ``evaluation,'' and ``project,''. For
example; an ``evaluation'' result means the lead is evaluating a
product and/or lead sales information. In an embodiment, the
system may require a fixed time limit for the ``evaluation''. The

10   ``evaluation'' result may only be chosen once per lead. Once the
evaluation time limit is over, the reseller may process and
identify 404 the result for the lead. A ``project'' result
identifies a lead that may be using the product(s) in a larger
project and further sales follow-up may be needed. In an

15   embodiment, the system may follow-up on leads that are processed
with a ``project'' result.

In alternate embodiments, the reseller can enter a
description of the result and/or a combination of a predefined

20   set of results. Accordingly, once the reseller enters the result
information the present invention automatically processes the
result and sends the above described confirmation and
notification.

25   As described above, a feature of the present invention is
that it automatically increases the accuracy of the reporting
process when compared to conventional systems and methods. The

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present invention accomplishes this by automatically sending 404 a confirmation of the processing result to the reseller and by automatically sending 410 a notification of the result to the lead and to the administrative unit 130. It is unlikely that a

5 reseller would misrepresent or otherwise intentionally process an inaccurate result knowing that the lead will be notified of the result. Accordingly the present invention increases the accuracy of the reports.

10 The lead control unit 114 then automatically places the selected and processed lead into a ``processed'' set of leads by changing a flag value associated with the lead, for example. The leads in the processed set are not available to be selected by resellers unless, in some embodiments, they are independently

15 received into the system again via the lead input unit 116. The reseller control unit 118 then stores 414 the processed result with the reseller record in the reseller unit 112 and/or the lead unit 110.

20 As described above, leads can be input into the system using a variety of techniques via a lead input unit 116. In general, a lead source will have the necessary lead information in a storage device, e.g., a hard disk drive, and will transfer the lead data from the lead source's storage device to the lead unit 110 via

25 the lead input unit 116. The lead input unit may translate information and reformat the lead data to match the format of the lead data. Many different formats may be used without departing

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from the scope of the present invention. In addition many

different techniques are available for transferring the data from

the lead source's storage device to the lead unit, e.g., over the

Internet, and such techniques will be apparent to persons of

5   ordinary skill in the art.

In addition, in the preferred embodiment, the reseller, lead

source and the lead can check the status of the lead using any

one of a variety of techniques. In the preferred embodiment the

10 lead status request will provide the current selection status of

the lead (active, selected, processed) and if processed the

result of the processing and the reseller. It will be apparent

that additional information may be presented during a status

request.

15

One embodiment of the present invention is described using

computer screen displays set forth in Figures 5-9. This example

describes the lead selection and processing aspects of the

invention and is described with reference to Figures 2-4. The

20 scope of the claimed invention is not limited by this preferred

embodiment. Figure 5 is an illustration of a computer screen

display available to a user according to one embodiment of the

present invention. A reseller connects to the system, e.g., over

a network, e.g., a WAN 135 such as the Internet or an intranet,

25 telephone network or faxnet, for example. A screen is displayed

to the reseller giving the reseller a variety of options such as

selecting a new lead, processing (providing feedback on) a lead,

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or various administrative options, for example. After requesting 302 to select a lead, the reseller is presented with the ability to execute a search of all of the leads in the lead unit 110. As described above, the reseller can request to execute a search

5 command using a variety of different parameters in many different fields. In this example, the fields are ``Date,'' ``Company,'' ``City,'' ``State,'' ``Vendor,'' and ``Product,'' as shown in Figure 6. Figure 6 is an illustration of a computer screen display showing a lead search result according to one embodiment

10 of the present invention. From the list of leads the reseller selects 314 one or more leads. In this example, the reseller can use a computer keyboard or a pointing device to select the lead by giving an indication in the ``Select'' box. Such an indication can be by using a conventional pointing device and

15 ``clicking'' on the select box 602. In addition, this page provides the reseller with information about the number of active leads they have and the number of leads that the reseller may select. In this example, the reseller has four active leads and can select up to six additional leads.

20

Figure 7 is an illustration of a computer screen display showing a summary of selected leads according to one embodiment of the present invention. In this example, this page can be accessed by selecting the active leads button 702. The selected

25 contacts are automatically sent 320 a notification that the reseller will be contacting them. As described above, when compared to conventional systems this reduces the chances that a

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contact will become cold while providing a motivation to promptly

contact the lead. The system then provides additional

information about the selected leads to the reseller. Figure 8

is an illustration of a computer screen display showing

5 additional detail of a selected lead according to one embodiment

of the present invention. This information is used by the

reseller to contact the lead. If necessary, the reseller, after

seeing the additional information, can de-select a lead. In this

situation the lead will placed back into the active set of leads.

10 An additional notification may be automatically or manually sent

to the lead and the de-selection may be stored in the reseller's

record in the reseller unit 112.

    After contacting the lead, the reseller may process 210 the

15 lead. Figure 9 is an illustration of a computer screen display

showing how a user provides feedback about lead results according

to one embodiment of the present invention. In this example,

each of the selected leads is listed and a drop-down box is

available under the ``Status'' field which enables the reseller

20 to select one of several options. In this example, the options

include ``Purchased,'' ``No Interest,'' and ``Project.'' The user

selects the proper result and then selects the ``submit'' button

on the computer screen.

25   In addition, the present invention can automatically prepare

reports. The reports provide a timely and accurate method for

the reseller, the administrator and/or the vendor or lead source

to check the status and/or history of leads. Reports may be presented in one or more formats, e.g., tabular, graphs, on a computer display, and/or as print-outs. In an embodiment, a report may include but not be limited to information about the

5   number of leads processed, the number of leads converted to sales, the number of leads in active use and the number of leads processed by a reseller. In the preferred embodiment, reports automate the process of providing accurate, timely feedback to the vendor, lead source or lead. The vendor control unit 134

10 controls the content of a report so that a vendor or lead source will only be able to access information about leads that they have provided. The reseller control unit 112 controls the content of reports so that each reseller sees reports only about their active and processed leads.

15

While the invention has been particularly shown and described with reference to a preferred embodiment and several alternate embodiments, it will be understood by persons skilled in the relevant art that various changes in form and details can

20 be made therein without departing from the spirit and scope of the invention.

CLAIMS

What is claimed is:

1.   A computer-based method for distributing leads from a lead database, the method comprising the steps of:

receiving a lead request from a user;

providing a selected lead to a user in response to said lead request;

preventing said selected lead from being provided to another user;

receiving a processing request from the user for the selected lead;

processing the selected lead to identify a result of said lead;

automatically sending a first confirmation message to the user; and

automatically sending a second confirmation message to the lead;

wherein said first and second confirmation messages indicate said result.

2.   The method of claim 1, wherein said first and second confirmations are sent via a wide area network.

3.   The method of claim 2, wherein said wide area network is an Internet.

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4   The method of claim 1, further comprising the step of:

automatically sending a confirmation message to an

administrator.

5.   The method of claim 4, wherein said first and second

confirmations are sent via a wide area network.

6.   The method of claim 5, wherein said wide area network

is an Internet.

7.   The method of claim 1 wherein said lead request

identifies one or more parameters the lead must have (location,

product).

8.   The method of claim 1, where each lead includes at

least one of contact information and product information.

F&W Ref. 4705

ABSTRACT OF THE DISCLOSURE

A system and method for efficiently, accurately, and inexpensively receiving, assigning, and tracking leads. In one embodiment, the invention enables leads to be efficiently identified by an interested partner or reseller by providing a database of leads that can be searched according to a variety of parameters. In one embodiment, the invention also reduces the number of leads that become cold by quickly and efficiently matching sources of leads with a variety of salesmen/resellers/users who are interested in utilizing a lead. In one embodiment, the present invention motivates a reseller to promptly contact a lead that the reseller selects by limiting the amount of time that a lead is available exclusively to the reseller. The reseller must contact the lead before the lead becomes available again to other resellers. In one embodiment, the invention also automatically provides feedback to the lead and/or to the source of a lead when a reseller selects a lead and when the reseller processes the lead in order to increase the accountability of the reseller. In an embodiment, the invention also provides a system and method for automatically evaluating the result of a contact which enables the lead source to better track the results of providing leads. In an embodiment, the present invention also automatically increases the accuracy of the reporting of results by automatically sending the results of the contact, as reported by the reseller, to the lead, the system administrator, and to the lead source. In addition, the present

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F&W Ref. 4705

invention automatically introduces the reseller to a lead before

the lead is contacted by the reseller.

Figure 1

Begin

Reseller selects lead
202

Is
Timelimit for
processes
approaching?
204

Send Reminder
206

Yes

No

Has
processing T/L
expired?
208

Automatically place lead
into active set of leads
212

Yes

No

Automatically send
notification to lead and
reseller
214

Process Lead
210

Store result in reseller
record
216

Continue

Figure 2

Figure 3a

A

Automatically send
confirmation to reseller for
each selected lead
316

Automatically send
notification to lead and
administrator for each
selected lead
320

Provide additional
information about each
selected lead to reseller
322

Automatically remove
selected leads from active
set of leads and move
into selected set of leads
324

B

Continue

Figure 3b

Figure 4

```
        ╭─────────────────────╮
        │    Process Leads     │
        │       (210)          │
        ╰──────────┬──────────╯
                   │
                   ▼
        ┌─────────────────────┐
        │ Choose a selected    │
        │ lead to process      │
        │        402           │
        └──────────┬──────────┘
                   │
                   ▼
        ┌─────────────────────┐
        │ Identify the result  │
        │ for the selected     │
        │ lead                 │
        │        404           │
        └──────────┬──────────┘
                   │
                   ▼
        ┌─────────────────────┐
        │ Send confirmation to │
        │ reseller             │
        │        406           │
        └──────────┬──────────┘
                   │
                   ▼
        ┌─────────────────────┐
        │ Automatically send   │
        │ notification of      │
        │ result to lead and   │
        │ administrator        │
        │        410           │
        └──────────┬──────────┘
                   │
                   ▼
        ┌─────────────────────┐
        │ Automatically place  │
        │ selected lead into a │
        │ Processed set        │
        │        412           │
        └──────────┬──────────┘
                   │
                   ▼
        ┌─────────────────────┐
        │ Store result in      │
        │ reseller unit or     │
        │ lead unit            │
        │        414           │
        └──────────┬──────────┘
                   │
                   ▼
        ╭─────────────────────╮
        │      Continue        │
        ╰─────────────────────╯
```
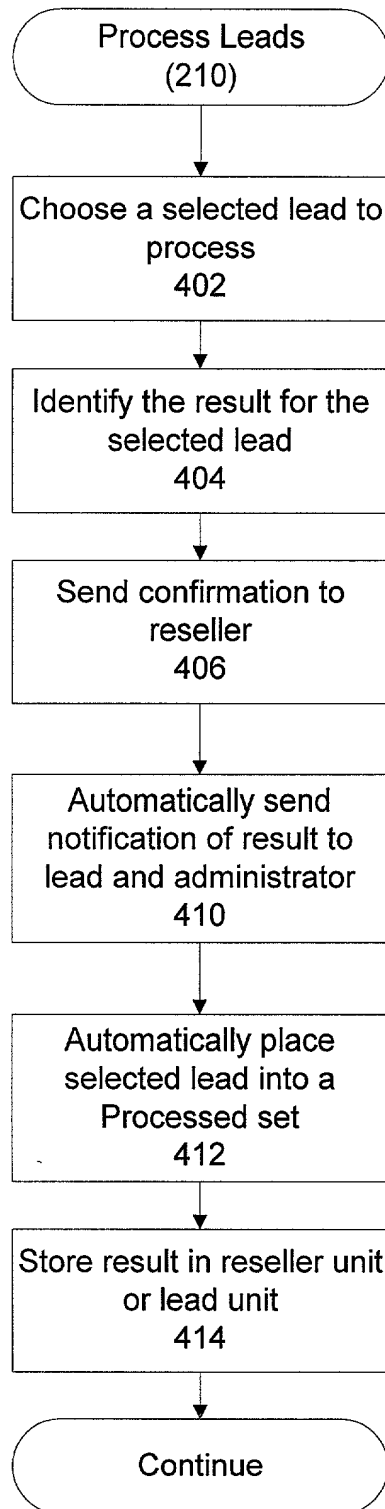
LeadSource1

⌂ ✉ ? B2B §

Web Development Corp., Welcome to LeadSource1.

Please select an option from the menu on the left.

Sidebar menu:
- Select
- Active Leads
- Feedback
- Reports
- Account
- Help
- Logout

FIGURE 5

LeadSource1

⌂ ✉ ? B2B

Internet 2000

Available Leads for Web Development Corp.

_602_

Quick Search: [   ] [search]

reset search

You have 4 active leads. You may select up to 6 more leads.

Date ∧∨	Company ∧∨	City ∧∨	State ∧∨	Zip ∧∨	Vendor ∧∨	Product ∧∨	Select
09-Feb-2000	Custom Computer Services	Louisville	KY	40222	Ipswitch	IMail Server	☐
09-Feb-2000	KTECH	Vandalia	OH	45377	Ipswitch	IMail Server	☐
09-Feb-2000	Integrity Online	Hesperia	CA	92345	Ipswitch	IMail Server	☐
09-Feb-2000	Westworld Communications,	Chatsworth	CA	91311	Ipswitch	IMail Server	☐
09-Feb-2000	Custom Home Automation	Wixom	MI	48393	Ipswitch	IMail Server	☐
09-Feb-2000	Auction Live TV Inc.	St. Louis	MO	63033	Ipswitch	IMail Server	☐
09-Feb-2000	Pc3	Brighton	CO	80601	Ipswitch	IMail Server	☐
09-Feb-2000	DIGITAL2	H. P.	IL	60035-1076	Ipswitch	IMail Server	☐
09-Feb-2000	Kritech	Oklahoma City	OK	73170	Ipswitch	IMail Server	☐
09-Feb-2000	Berlos Inc.	Baltimore	MD	21219	Ipswitch	IMail Server	☐

FIGURE 6

LeadSource1

⌂ ✉ ? B2B §

Leads Selected for Web Development Corp.

Here are the leads you have selected from our database. Click on a company name to display detailed information about that lead. Click on "view email" to see copies of the email sent to the lead and to you."

Company	Product	City	State	
KTECH	IMail Server	Vandalia	OH	view email
eagle computers	IMail Server	Kent	WA	view email

A customized email has been sent to each company indicating that you will be contacting them shortly to discuss their interest.

FIGURE 7

☐ ✉ ? B2B S

Active Lead Detail

Company:	KTECH
Address1:	1244 CRESTWOOD HILLS DRIVE
City:	Vandalia
State:	OH
Zip:	45377
Country:	
Company Website:	

Contact Name:	Khamla Ramont
Contact Title:	
Phone Number:	+1 (781) 898-0053
e-mail:	enduser@internet2000.com

Vendor:	Ipswitch
Product:	IMail Server
Lead Generated:	09-Feb-2000
Lead Selected:	22-Feb-2000

Select
Active Leads
Feedback
Reports
Account
Help
Logout

FIGURE 8

⌂ ✉ ? B2B 5

Sales Lead Feedback
Leads Currently Selected by Web Development Corp.

Select
Active Leads
Feedback
Reports
Account
Help
Logout

You have 6 active leads.

Selected ∧∨	Generated ∧∨	Company ∧∨	Product ∧∨	Status	Days Left ∧∨
18-Feb-2000	09-Feb-2000	CNC Technologies	IMail Server	No Interest ▾	11
18-Feb-2000	09-Feb-2000	PC SAMS LLC	IMail Server	▾	11
18-Feb-2000	09-Feb-2000	ADG	IMail Server	Purchased ▾	11
22-Feb-2000	09-Feb-2000	NA	IMail Server	▾	14
22-Feb-2000	09-Feb-2000	KTECH	IMail Server	Project ▾	14
22-Feb-2000	09-Feb-2000	eagle computers	IMail Server	▾	14

submit   clear

FIGURE 9